

Support Services

Deleting client sales

Pre-update Questions:

- Have you created a backup of the data?
- Has the client reported the sales they made to the BIR?
 - this is to make sure that we don't change any data that has already been reported.
- When is the starting date according to the permit? and have they reported the sales to the bir or have encoded the data in their POS book?
 - this is to make sure that sales made after the effectivity date are not modified especially if they are already reported.
- Ask the client to choose which of the following do they want to delete:
 - All transaction
 - All POS sales only
 - All Sales including the POS and the WH sales
 - Keep the inventory before deleting or not.
- check version of the client to be deleted. Make sure the SQL query you're using is updated.
- Is the client requesting to delete the sales because they now have a PTU? If yes, what is now their correct tax type? is it the same with the current setup?

To Double Check:

- Are all the triggers and procedures still existing?
- If the client wants to keep the inventory, is the inventory still the same as before deleting?
- Are the OR numbers after the effective date of the PTU still continuous and starts at 001? and have you informed the client to redo the Z-reading
- In case you deleted the sales from a sub branch, have you deleted the sales in the main branch too? And if the client is using the Manual sync, have you finished all the pending files to be synced?
 - This is to avoid issues in the autosync and the data after the task was done.
- If the client asked to reset the inventory of a sub branch, check the main branch if the data for the sub branch's inventory and product transaction summary is reset too.

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